



Policy Drivers Technical Note

Policy drivers refer to external and internal influences that shape a given sector through legislation. In the agricultural sector, this could be anything from public opinion to international movements that are likely to impact the sector and steer legislation. Importantly, policy drivers can result in changing practices and legislation from non-policy influences or can be born from policy decisions themselves.

Agriculture stakeholders in Scotland are aware of the large-scale policy transitions that are currently taking place. This transition is largely being steered by the UK leaving the European Union (EU), creating an opportunity for the Scottish Government to realign the sector to independent objectives, as opposed to the EU's Common Agriculture Policy (CAP). The policy to replace the CAP is one that is self-reportedly climate-conscious, directly tying into net zero commitments. Subsidy payments are being swapped for payments tied to the creation of public goods, such as increasing biodiversity and restoring ecosystems.

Some drivers have a less tangible link to the current landscape, but are still vital to discussion, especially when understanding how policy sometimes conflicts with current market shocks and alternative priorities. Agricultural stakeholders are navigating an industry that is not only affected by the Scottish government's commitments such as independence and net zero commitments, but also has been seen to flex and react quickly to external shocks such as COVID-19, unprecedented rises in costs of production, the ever-increasing focus on the health crisis in Scotland, and more recently food security concerns that have arisen from international conflict such as the war in Ukraine.

It is these factors that have largely contributed to and shaped current and future policy that we may expect, such as the Climate Change Act 2019, the Agriculture Bill and the Good Food Nation Act.

How has international policy and commitments shaped Scotland's agriculture policy?

There are three main ways in which international legislation drives Scotland's agriculture sector: (1) international commitments that steer national objectives, such as Sustainable Development Goals; (2) International legislation that has guided the sector so far, such as the EU's CAP; and (3) trade agreements and the policy of key trading partners and competitors.

Sustainable Development Goals and Net Zero Commitments

The UN Sustainable Development Goals, particularly the Post 2015 Agenda, saw world leaders pledge common action across a broad and universal policy agenda, including a global pursuit to sustainability within agriculture which thereby created a need to nationally underpin through policy and legislation.

Goal Two has particular importance within the sector and alludes to the increasing pressure to both tackle food availability issues whilst protecting the environment. Goal Two has the objective of ending hunger, achieving food security, and improving nutrition. In the same breath it also stresses the objective to do this whilst promoting sustainable agriculture through resilient agricultural practices and increased productivity, whilst maintaining ecosystem health and progressively improving land and soil quality¹. Whilst the UK is not so vulnerable when it comes to food security or arguably food availability, there are still important discussions to be had over how to best utilise land in a balanced way that prioritises both food security and ecosystems.

Since 2015, the UK Government and devolved governments have set a plethora of policy which alludes to the direction and balance of land use, whilst contributing to emission reduction and other environmental objectives which directly feeds into the SDGs among other international commitments. The Agriculture Bill, for example, has commitments to the environment as legally binding, holding the Government accountable if these should not be met².

COP26

The 2021 Conference of Parties held in Glasgow (COP 26) increased the pace and urgency of delivery to meet the collective goal of limiting warming to 1.5 degrees by finalising the Glasgow Climate Pact 2021³. This pact focuses on (1) mitigation through setting new 2030 emissions targets; (2) adaptation through pledging finance into driving aid in this field; (3) finance through mobilising some \$100 billion in climate finance; and lastly, (4) promoting collaboration through finalising a common reporting of emissions to aid transparency. Importantly, this pact also encompasses the agreements to end deforestation by 2030.

Why is 1.5 degrees so important?



Whilst incremental climate change imposes risks and threats to our current system, global warming above 1.5 degrees has been widely agreed to have exponential negative impacts comparatively, particularly due to reaching 'tipping points' where damage to natural regulation systems and ecosystems, such as our forests, oceans, and ice, cause irreversible damage.

COP27

The 27th United Nations Climate Change Conference (COP27) in Sharm el-Sheikh, Egypt, continued with efforts to mitigate the effects of climate change. Progress towards significantly reducing greenhouse gas emissions was limited in comparison to previous COP meetings; however, some major breakthroughs were made.

The Sharm el-Sheik Implementation Plan⁴ summarising key decisions made over the week, included agreement on 'Loss and Damage', which will provide financial support for communities who have faced the worst impacts of climate change to adapt and rebuild.

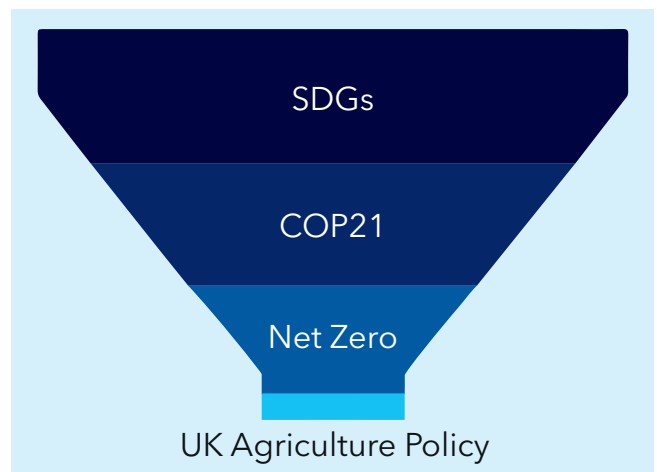
Recognition of the unique potential of agriculture to tackle climate change continued with the renewal of the Koronivia Joint Work on Agriculture, which following 'more meeting time than any other item at COP27', agreed the 'Joint work on implementation of climate action on agriculture and food security'⁵. On the first-ever day dedicated solely to agriculture at a COP, the 'Food and Agriculture for Sustainable Transformation' (FAST) initiative was launched. FAST aims to improve the quantity and quality of climate finance contributions to transform agriculture and food systems by boosting access to investment, increasing knowledge, and providing policy support and dialogue⁶.

It will be some time before we see exactly how COP27 commitments filter through to impact domestic agricultural policy, although historically the trickle-down effect from the UK's participation in international initiatives has created the need for national strategies such as the Net Zero Commitment.

COP 15

The agreement to halt and reverse biodiversity loss by the end of the decade at the COP15 UN Biodiversity Conference matched the urgency declared towards climate change within COP21's Paris Agreement. The UK, alongside nearly 200 other countries, signed the Kunming-Montreal Global Biodiversity Framework (also known as the '30 by 30' deal) to protect at least 30% of Earth's ecosystems by 2030.

Achieving ambitious targets such as halving excess nutrients, pesticide risk and food waste by 2030 will undoubtedly shape the direction of UK agricultural strategy and funding over the course of the decade. Nature-based solutions that address both biodiversity loss and climate change through 'sustainable management of agriculture' offer a key strategy for farmers and land managers to maintain, enhance and restore ecosystems across the 71% of the UK's land stock covered by agriculture, whilst contributing to the net zero pathway.



The Influence of the European Union

EU policy has largely governed the national agriculture sector for more than 50 years, before the UK's departure, creating an undeniable influence on the current UK agricultural landscape. This is especially important when understanding current trading partners.

The Common Agriculture Policy was launched to support farmers and improve productivity, safeguard farmers, promote jobs within the agri-food industry, and latterly help tackle the climate crisis¹. This policy shaped the landscape of agriculture in the UK in many ways, but notably through providing subsidies to farmers as long as they were compliant with various regulations or codes of good practice. Being able to move away from EU governance, in general, was one of the driving forces for Brexit. Scotland has since published its Agriculture Bill 'Vision for Agriculture', which begins to move away from subsidising farmers for food production and brings in greater incentivisation for the generation of public goods. This move is also being echoed among the EU, whereby CAP reforms are being negotiated in 2023, and is set to be more devolved through National Strategic Plans and will work towards the objectives of the EU's Green Deal Objectives⁷.

National Policy Landscape

Scotland's national agriculture policy is being steered by a few key drivers, namely environmental pressure from both international commitments and the public, as well as larger system shocks such as Brexit. Whilst frameworks such as the Climate Change (Emissions Reduction Targets) Act 2019 have more long-term goals, more immediate initiatives that support these objectives are in the process of being enacted through legislation such as the Agriculture Bill, Good Food Nation Bill and Natural Environment Bill. Whilst this legislation aims to increase transparency for the future of the sector, current farmers and new entrants understandably may feel more on edge due to the transitional nature of the industry at present.

Scotland's agricultural policy and drivers importantly attempt to compromise between the stark transition of England and Wales away from CAP and the evolving agricultural policy within the European Union. Whilst the current policy landscape of England and Wales has made it clear that the EU exit was an important chance to steer away from CAP and towards incentives for public goods, Scotland is regarded to be on the trajectory to somewhat sit between the two, aligning itself with the CAP's system of direct payments, and ensuring that can be built upon to contribute to emission mitigation and landscape restoration objectives. This is not to say that the policy landscape is not ambitious in its environmental targets, as the country has repeatedly aimed to be global leaders in sustainable food production since hosting COP26 in Glasgow in 2021.

The agricultural landscape currently is being governed by policy that has enabled Scottish Ministers to ensure the continuation of direct payments after the UK left the EU. There is ongoing movement in policy that paints a relatively clear picture of the elements that will drive and be set into future agricultural policy. These are outlined in a combination of policies, proposed bills, and objectives set by the Scottish Government, that will drive the agriculture sector, namely:

- Delivering the Vision for Agriculture: Agricultural Bill
- Just Transition Plan: A Fairer, Greener Scotland
- The commitment to align with and integrate CAP objectives

Scotland's Climate Change Plan

Scotland's Climate Change Plan⁸ sets out the Scottish Government's pathway to the series of targets set out in the Climate Change Act 2019, with the primary goal to reach net zero by 2045⁹. This strategy is driven by international and domestic pressure to respond to the climate crisis and was led by Scotland's declaration of a global climate emergency in April 2019. The commitments within this document directly influence agricultural stakeholders by highlighting the pressure for land use to prioritise biodiversity objectives and achieve emission reductions through nature-based solutions.

The Climate Change Act 2019 builds upon commitments made in the Climate Change Act 2009 by increasing the ambition of Scotland's emissions reduction targets and revising interim and annual emissions reduction targets, including an interim target of 70% reductions by 2030. The Scottish Government formulated the Climate Change Plan to close the gap between business as usual and 2045 net zero emission targets. For the agricultural sector this is particularly significant as it to be one of the hardest sectors to decarbonise. It is, however, the commercial sector that operates most closely with the environment. For these reasons, it can be expected that environmental objectives will play an increasingly important part in the sector in the future.

Key actions outlined in the Climate Change Plan include:

- Reducing greenhouse gas emissions through a Just Transition to a net zero economy and society
- Driving Scotland's adaptation to climate change
- Engaging with business and industry on decarbonisation
- Leading international action on climate change

Not only do initiatives focus upon increasing biodiversity and reducing impacts of the local environment, the Plan highlights that innovation has an important role in reducing emissions through private investment, research and grant schemes. Residual emissions are still to be expected, but this Plan highlights the national expectations of the sector to largely decarbonise.

Farming for 1.5



An independent enquiry of farmers, academics and NGOs published Farming for 1.5 in 2021¹⁰, which outlines a consensus pathway to make Scottish farming climate compatible. It targets the Paris Agreement to limit warming to below 1.5°C, taking the sector from where it is today to net zero in 2045. Recommendations within this transformation pathway include:

- whole farm contracts to deliver on farming and nature from 2024;
- reducing total emissions from agriculture while maintaining food production per capita;
- rapid uptake in low methane breeding for cows and sheep.

Where is CAP going and what will this mean for Scottish farmers, crofters, and land managers?

The new EU Common Agricultural Policy aims to build upon the foundations that created the need for direct payments, to ensure competitiveness and fair income for farmers, as well as to support their position in supply chains. This is increasingly expanding to include more green objectives and drives for the protection and creation of public goods through the monitoring and mitigation of greenhouse gases, preservation of landscapes, and the promotion and restoration of biodiversity. The Scottish government have explicitly expressed the desire to remain in line with the CAP, whilst being able to blend the needs of the country and be flexible to respond to UK legislation in the sector if needed. Whilst direct payments have not been widely updated to reflect these new objectives yet, it can be expected for direct payments to be built upon to link in with wider green objectives, similar to the movement within the European Union. The overview of what these payments may look like, are addressed in the Vision for Agriculture framework.^{11,12}

Vision for Agriculture

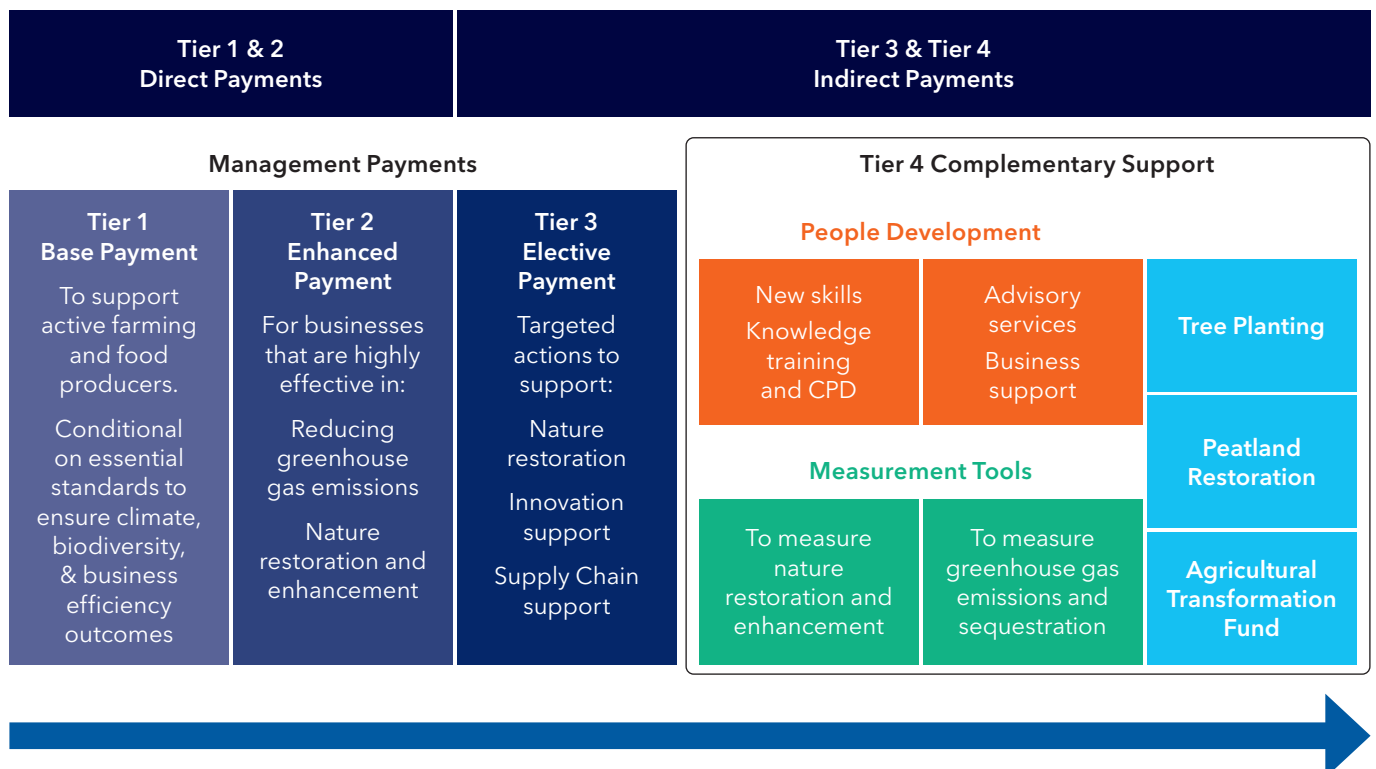
Scotland's proposed Vision for Agriculture is expected to be implemented through the adoption of the Agricultural Bill, anticipated to be passed in 2026¹². The Bill aims to find a balance between economic support and the promotion of growth, as well as conservation and mitigation of greenhouse gases through the following objectives:

- Promote high quality, locally produced food, in accordance with the Good Food Nation Bill
- Maintain direct payments framework
- Promote market diversity to drive exports and food security
- Incentivise the mitigation of biodiversity loss and promote the creation of biodiversity
- Promote low emissions production

Many of these objectives are expected to be achieved through direct payments and enhanced conditionality of those direct payments. Conditionality refers to the terms that must be met in order to receive direct payments. Conditionality in the future may therefore include carbon and biodiversity audits, soil sampling, nutrient management plans, forage plans, and animal health and welfare plans. Interestingly, when it comes to greenhouse gas emissions, the Vision for Agriculture avoids aiming for increased production whilst maintaining emissions, but to produce the same output per capita whilst producing less emissions. This can be assumed to be driven by the stated need to reduce agricultural emissions by 31% from 2019 levels by 2032 according to the Climate Change Plan⁸.

The following diagram identifies the expected tiers of the agricultural support package:

Vision of Agriculture Support Package Beyond 2025



Source: The Scottish Government, 2022¹²

Key drivers of Scottish agricultural policy can be identified in this diagram, from business efficiency, innovation, and supply chain support to biodiversity and restoration objectives. It is important to note that despite being named under a package of direct payments, Tier 1 could be accessed by meeting certain environmental objectives, and that Tier 2 will reward farmers and crofters for the reduction in greenhouse gas emissions and contributions to national objectives on this front. Tiers 3 and 4 will adopt an elective payment system that intend to drive targeted and specific measures and will be established as competitive support schemes, in which farmers must bid for support. Tier 3 provides payments based on specific locations and skills, whilst Tier 4 provides payments to develop specific agricultural sub-sectors.

Organic and regenerative farming in the Vision for Agriculture



A notable inclusion within the agricultural bill is the movement towards more organic practices and to accelerate the adoption of approaches which has low or no chemical inputs. This signifies that the movement towards organic practices is a key element of the larger green transition pathway, and key policy initiatives are likely to be produced to support these objectives in the future.

The proposed Bill has come under scrutiny from the National Farmers Union, who call for more focus on ensuring productive and economically sustainable agriculture enterprises first, which will promote the long-term investments needed to achieve environmental objectives. There are worries that the proposed Bill will create more red tape for struggling farmers and crofters who are trying to access the direct payments¹³. Other stakeholders within the sector however, including the Chartered Institute of Ecology and Environmental Management calls upon funding to be prioritised on Tiers 2, 3, and 4 which are generally expected to hold more pioneering environment-led objectives¹⁴.

The Bill is expected to be passed in 2026, after going through a pilot phase and a call for industry comments. Nonetheless, the international movement regarding the adoption of environment-led objectives within the agriculture sector is expected to be a key driver in future Scottish agricultural policy.

The Agriculture Bill fits into wider legislation around food and farming and will be linked to the Good Food Nation Act, Land Reform Bill, Natural Environment Bill, and Crofting Bill.

Good Food Nation Act

The Good Food Nation Act (GFN) aims to make positive change to Scotland's food system¹⁵. GFN aims to bring a whole system approach to combat a series of objectives across the food and drink sector, of which agriculture makes a significant contribution. This whole systems approach looks to address some of the problems in Scotland's food system, such as increased usage of food banks, degradation of nature and poor workers' rights. By bridging farming and food policies to create a more linked up approach it is hoped the current landscape of Scotland's food system will improve by limiting food waste, increasing access to nutritious food, strengthening food security and linking communities with local food production. For the agricultural sector the most tangible changes are likely to be felt through enhanced local networks, with the explicit aim for Scottish producers to 'ensure that what they produce is increasingly healthy and environmentally sound'. As an outcome of GFN, the purpose of food production could be refocused so that protecting nature whilst feeding people becomes an integrated approach.

Natural Environment Bill

The Scottish Government has committed to releasing a Natural Environment Bill in 2023¹⁶, with the overarching target of halting biodiversity loss by 2030, and restoring Scotland's natural environment by 2045. The Bill will put into place key legislative changes to help restore the nation's biodiversity and habitat through statutory target-setting, monitoring, enforcing, and reporting. It recognises that farmers and land managers will play a significant role in tackling the twin crises of climate change and nature loss. The £65 million Nature Restoration Fund linked to this includes provisions to support nature restoration and the principles of regenerative agriculture, which are also key aims of the reformed agricultural support scheme.

The Scottish Biodiversity Strategy¹⁷ provides a precursor to the Natural Environment Bill and consistently highlights the importance of farmers and land managers in achieving restoration of the natural environment through a focus upon landscape-scale change and supporting nature-friendly farming. Initiatives driven by the agricultural sector, such as peatland restoration and regenerating healthy soils and woodlands, are set to make a 40 per cent contribution to Scotland's net zero journey.

Just Transition: A Fairer, Greener Scotland

The Just Transition Commission was established in Scotland in 2019 to provide practical and affordable recommendations to the Scottish Government for the nation to transition from a carbon dependent economy to net zero by 2045¹⁸. These recommendations aim to reflect a strategy that delivers a just and fair approach to tackling climate change and to ensure that no group or sector is disproportionately disadvantaged. Agriculture is a common theme throughout the Just Transition Commission's recommendations, which include equipping farmers and land managers with the skills, training, and advice they need, establishing a new sustainable Scotland brand to support Scottish agriculture and creating a Just Transition Plan for Scotland's land and agriculture and include clear milestones out to 2045. The Scottish Government are well engaged with the Commission and intend to address recommendations made with a full and comprehensive review of land-based learning, a fund for new entrants and a commitment to set out a Just Transition Plan in time for the post-CAP subsidy regime.

What are the key policy drivers?

Various policy drivers have been present when exploring the current political agricultural landscape and legislation. The main drivers so far have been identified as the Green Movement, Brexit, animal welfare, food security and health. Whilst some drivers have been gaining momentum gradually, others such as Brexit and food security have been altered and enhanced through external influences such as the COVID-19 pandemic.

The Green Movement and Net Zero Commitments

The Green Movement has already had a substantial effect on the agricultural sector, from carbon footprinting initiatives to the increased focus on environmental land use options. The influence not only comes through legislative bodies, but through supply chain and public pressure that has had a large effect on demand.

Some systems are further ahead than others in respect to understanding on-farm emissions, such as dairy for example, which ultimately has been down to supply chain incentives and pressures. Other sectors may expect a similar pathway to occur as retailers become more focused on understanding scope 3 emissions, and the public become more interested in understanding what food products are linked to lower emissions. This will be especially important given the globalised nature of the sector, where many other competitors that match welfare standards are more versed in understanding farm-level emissions.

One of the reasons that the agriculture sector is so driven by the Green Movement is not only due to the proven global and local environmental impacts of farming, i.e. from ammonia emissions to eutrophication, but also due to the inextricable link between agriculture and the environment itself and subsequent land use trade-offs. Because of this interaction, agricultural stakeholders are uniquely placed to be able to focus on mitigation measures and land use or sequestration opportunities. Arguably, no other commercial industry works more closely with the environment, creating the option for the Government to largely place agriculture at the centre of biodiversity and rewilding objectives through strategies such as ELMs.

One barrier that may hinder the impact of the Green Movement as an important policy driver is shocks to the UK that may place other drivers, such as food security, as a higher priority. This may be similar to the dramatic changes in food demand due to the pandemic for instance, or could be more long term such as the climate crisis. Potential future effects of climate change are likely to exacerbate land use trade-offs as the productivity of land and availability of water changes in response. How stakeholders should respond to both climate pressures and food demand alike is likely to be an important question for many, often prompting the discussion between 'land sharing' (integration of environmental initiatives within agricultural parcels) and 'land sparing' (distinct agricultural and biodiversity separation). This trade-off is exacerbated further through the development of government-led initiatives that incentivise rewilding and other biodiversity promoting initiatives.

What impact did the pandemic have on the agriculture sector?



- Demand switched from hospitality to food retailers. This was both by government guidance and due to increased home-cooking, as well as stockpilers. Retailers were forced to reorganise on a massive scale to deal with increased demand whilst balancing supply.
- Changes in demand for products quickly shifted and left gluts and scarcity of various products. Milk and potatoes saw a reduced demand due to fewer people eating in restaurants and cafes. Demand for mince soared whilst expensive cuts of meat decreased.
- Many farmers also lost supplementary income whether that might be in smaller scale markets or other income streams such as bed and breakfast and camping opportunities¹⁹.

Brexit and Labour Shortages

The impact on the UK from leaving the European Union has created a surge in agricultural policy and trade agreements which will all contribute to shaping the agriculture sector going forward. The level of control the Scottish Government has over these decisions varies, with greater independence over agricultural policy, yet close ties to the UK Government with trade. The initial impacts of Brexit have impacted the sector in numerous ways that legislation has arguably not responded to yet, however it may do so in the future.

Labour Shortages

The sector has seen a huge drop in the number of immigrant workers post-Brexit that are vital to the agricultural industry. This has been further exacerbated in recent years due to the complexities of travelling over the COVID-19 pandemic. In 2015, just one year before the Brexit referendum was signed, 20% of the workforce were EU nationals²⁰. The House of Commons reported a labour shortage in the food and farming sector that totals some 500,000 vacancies of 4.1 million roles¹⁹. The UK pig sector has been particularly hit, with some 30,000 pigs having to be culled on farm as a result of abattoirs running under capacity due to labour shortages²¹.

Reported Impacts of Labour Shortages on the Agriculture Sector in 2021



- 24% of daffodil crop left unpicked
- 10% of cucumber growers didn't grow a second crop
- A scale back of 5-10% of the poultry sector due to 6,000 out of a required 40,000-person workforce not being available

The Scottish Government responded to the crisis through temporary short-term visas under the Seasonal Workers Pilot which many unfortunately regarded as too late for many stakeholders to take full advantage of. The uptake of these visas in 2021 was marginal, with only 32%, 14%, and 3% of poultry, pork butcher, and heavy goods vehicle visas respectively being applied for out of the total number of visas available. The lack of uptake was partially due to the very limited periods of time that workers were allowed to stay in the UK.

Trade

The future of international trade has been of increased concern for Scottish agriculture and food stakeholders through the uncertainty created by Brexit. It has been exacerbated by increased demands for national food security through the COVID-19 pandemic and even more so as a result of the impact of the war in Ukraine.

Many current concerns revolve around what trade agreement negotiations will mean for UK farmers regarding competition from other countries, who may have different welfare standards, lower carbon footprints, and ultimately could be more competitive on price. Despite the duty and tariff free access to the EU-27, the ongoing trade friction with the rest of the EU for UK exports and the unresolved nature of this, has been seen to be another major area of concern and frustration for UK farming and food producers.

With regards to the trade friction issues, UK exporters are facing more paperwork and longer processing times in exporting products to the EU than before, which is not being mirrored on imports into the UK. Despite this, as of 2022, export trade to the continent has almost regained parity with pre-Brexit levels, providing a testament to non-legislative trade drivers such as established trading connections and a continued demand for high quality UK products such as salmon, whisky, meat and dairy.

The UK government has been negotiating agreements with various countries and regions such as the US, the Oceania countries, Japan, and the Gulf, including preliminary talks with India and then the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) which consist of Canada, Malaysia, Vietnam, Singapore, New Zealand and Peru among others. The attraction of a deal with the CPTPP is assumedly the access to some 500 million consumers which is comparative to the EU-27 market.

The importance of these alternative trading factors, as John Giles, Divisional Director of Agri-Food at Promar International, states, is key when assessing the impact of trade agreements, and importantly, the impact of Brexit as a policy driver on the UK agricultural sector. Although new trade agreements might legislatively 'open up' new markets, there are important factors to consider in regard to export development, including:

- the established relationships with existing suppliers,
- developing an understanding of how the market concerned really operates,
- understanding how non-tariff barriers operate,
- building a real appetite to do business in these markets and seeing them as the future priority.

This is particularly important when speculating whether the UK's negotiations will increase competition from countries with different and/or lower animal welfare and product standards or approaches to production. When considering the US, the issue of chlorinated chicken, genetically modified soybean crops fruits and vegetables produced with higher tolerances of pesticides and hormone-treated beef are particular concerns for farmers, consumers, processors and retailers alike.

Common recent trends in international agri-food trade globally have been towards increased trade liberalisation, recently demonstrated by Australia and India's recently signed free trade agreement which has followed 10 years of discussion. As we have seen however, there is also an increased focus on securing domestic national food objectives given recent external shocks such as the pandemic, and the movement towards low carbon initiatives.

The overall drive from the UK to establish more trade agreements does however suggest a movement towards new markets, by which agricultural stakeholders may feel an increased pressure to compete in, under different conditions to that experienced within the EU. This volatility is likely to be mitigated somewhat however due to existing trade factors such as established import export relationships.

Animal Health and Welfare

Animal Health and Welfare is an important component when discussing policy drivers, as the topic cuts across many discussions in the sector, namely trade advantages, competition, and inclusion within larger agricultural and environmental objectives. In regards to trade, the UK's higher standards of animal welfare in comparison to many countries provides a competitive advantage, but only to markets where customers are prepared to pay slightly more for these standards. The importance of animal health in a trade context therefore, is linked to Brexit due to the threat of the UK market being opened up to potentially lower-priced suppliers with lower legislative standards.

These examples have highlighted the requirement for legislative guidelines in trade agreements on the animal standards expected for imported products²².

The effects of this driver on UK agricultural legislation and trade agreements are likely to become more visible as more light is shed on the UK's progress in trade discussions and negotiations. It is also important to remember the pride that UK farmers and the UK in general holds when prioritising animal health and welfare standards and what the implications may or may not be on a global stage going forward. It can however be an arguably safe conclusion that welfare standards will not drastically alter in the near future²³.

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